Maine
Adult Education's
Guide to
Workplace
Education

ACKNOWLEDGEMENTS:

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Introduction to the Guide

Who is This Guide For?

This guide has been created to support adult education programs in the development of educational programs specifically geared to the workplace. It focuses on adult education professionals who could include program directors, community education coordinators, vocational coordinators, as well as teachers and administrators. In essence this guide could be used by any staff member within a program.

The contents of this guide came from a variety of practitioners within Maine who have experience with workplace education, as well as current research and publications. The guide itself is a work in progress. It will continue to change as programs contribute their experiences...both the successes and the challenges.

Why a Guide?

The purpose of this guide is to provide a foundational roadmap. As with any comprehensive map there are generally a number of routes to be used toward a given destination. Workplace Education is as varied as the myriad of employers out there. While the program you design with any one employer is unique, the planning principles, marketing techniques, resources drawn upon will remain reasonably constant.

What is Workplace Education?

This seems a simple question yet as seen below there are many ways to define Workplace Education.

In Maine Adult Education we believe that customized workplace learning is an intentional educational program designed to meet the specific needs of both the employer and employee. The result: enhanced performance and productivity that improve the company's bottom line and employee job satisfaction.

According to Canada's Workplace Education Practitioner's Forum workplace education is:

- " intentional and responsive education through the workplace
- a delivery model that responds quickly and flexibly to the essential skill gaps/needs of employees in the context of their work needs
- partnership-based research, promotion, development, delivery, or evaluation activities
- a sustainable strategy for dealing with change
- planned and implemented with all stakeholders
- formal and informal learning based on principles of adult education
- training and development and company practice" [1]

These are just two definitions. There are many more. It would be important for every adult education program to create its own working, yet flexible, definition.

Workplace Education, Workforce Development and Economic Development

One of the most critical discussions today is the connection between workplace education, workforce development and

[1] Source (http://www.nald.ca/FULLTEXT/nls/inpub/forum/p18.htm)

economic development. "The goal of economic development is to increase the wealth of individuals, of businesses, of communities and of the state. The most critical element of economic development is workforce development. Workforce development means developing the skills and number of workers needed to supply the immediate and long term needs of the business community. Education is a key strategy of workforce development." [2]

Workplace education is the focus of this guide.

Why Become Involved in Workplace Education?

The mission of adult education in Maine is to provide educational opportunities for its residents to be effective workers, family members and citizens. Traditionally, adult education has failed to target their services to programs which would support the development of workers in their workplace. Adult education can play a critical role in ongoing workforce development through greater participation in meeting training needs of businesses.

It is important to know when not to be inolved in a project as well. Be sure you have a clear understanding what the business is looking for and whether your program has the capacity to deliver a quality program.

For more information on the case for workplace education you might want to start by reviewing Equipped for the Future's Work Readiness Credential web site (http://eff.cls.utk.edu/workreadiness/). Additionally, the various general information web sites listed in the Resources section provide a wealth of information on the importance of workplace education.

[2] Melanie Arthur Consulting, Magnolia MA, Business Forum "Meeting the Needs of Business" 2005

How This Guide Is Organized

This guide is divided into nine sections as illustrated below. While each section can be read independently of the others, it is suggested you start with Creating a Workplace Plan and work your way through to the final section which contains an expansive list of resources and a glossary.

Creating Your Workplace Education Development Plan

The plan you create can be short, sharp and focused. It is an internal document for you and your staff to use as you collectively construct your workplace education plan.

The following are questions which will help you target your planning process. The more specific you can be with your answers, the more focused and clear your plan will be. It is quite likely you will not know all the answers just yet; however, you will know what information you need to locate.

What Are Your Resources?

Human resources – people who are involved in your program including direct staff, school district personnel, students, partners in other agencies, contacts already existing within the business community, union representatives.

Information & Materials – while your program may already have instructional materials developed for particular workplace education programs there are many sources of information on developing customized instructional materials for the workplace (see the final section of this guide for a variety of information and resources).

Instructional methods – it is important to remember that your program's teaching staff have already been working with adults, many of whom are workers. The tools, techniques and methodology teachers use with their adult learners are invaluable resources for workplace-based programs.

Partnerships – the partnerships your program has with other organizations can be valuable to your workplace education planning. They can offer additional resources which will enhance your program. Partnerships will be discussed further in this guide.

Staff Development – how will you prepare your teaching staff for instruction in the workplace? What knowledge is critical for your teachers' effectiveness in the workplace? The next section will go into more detail on this very important topic.

Who Is Your Audience?

As you develop your workplace education plan, it is critical to keep the focus on your audience. Just who is that audience? It is the wide world of employers who will provide you with unique challenges! The audience is not limited to employers; you will need to consider the employees, your teaching staff, funders and other partners as well.

What Is Your Product/Service?

This question covers a broad range of possibilities including courses you have already provided to employers, your vocational course offerings, as well as courses you will customize for an employer's particular needs. Some adult education programs provide contextualized ABE, GED or ESOL classes within a workplace. Remember as well, the certificate programs developed by local programs. It is important to consider that the service you provide to an employer will be the ability to create a program/course which will meet their needs.

What Are Your Potential Funding Sources?

First consider what costs you will need to cover. Resources are needed for instructor salaries and benefits (prep-time as well as delivery), for subject matter experts, learning materials including assessments, evaluation tools and overhead costs. It is important not to forget the time it takes the program director (or other staff) to market their services, develop proposals and conduct meetings with employers. It is necessary for adult educators to be creative in the search for funding sources. Connecting and partnering with businesses, agencies and other educational institutions will be immensely helpful with it comes to funding.

"Offer courses specific to business/industry, i.e. GED preparation or customer service, with funds such as Carl D. Perkins Vocational Act funding, if applicable."
Bette Thibeault, River Valley Adult & Community Education

Fee-for-Service – Companies pay programs a fee for service to cover all necessary costs, i.e., instructional salaries and benefits, preparation and meeting time, materials and assessment, evaluation and overhead costs.

Governor's Training Initiative – Partial reimbursement of training costs may be provided to employers who are hiring new employees, and/or retaining or upgrading their existing work force. Training services eligible for reimbursement include: Recruitment, Assessment, Job Task Analysis, Workplace Literacy, High Performance Skills, Technical Training Higher Education, On-the-Job Training, Workplace Safety and Competitive Retooling. (http://www.state.me.us/labor)

State and Federal Grants – Periodically workplace education opportunities will be available via grants. Be sure your program is checking the Federal Register. (http://www.gpoaccess.gov/fr/index.html)

Employer Educational Tuition Reimbursement Programs – Explore possibilities with employers to take advantage of their reimbursement programs to cover costs of your program/course.

Foundations & Charitable Giving – Watch for opportunities, i.e. Libra, Betterment, Jane's Trust, Ford Foundation, and organizations such as Kiwanis and Rotary. You might also take a sector-based approach and look for funding from trade associations.
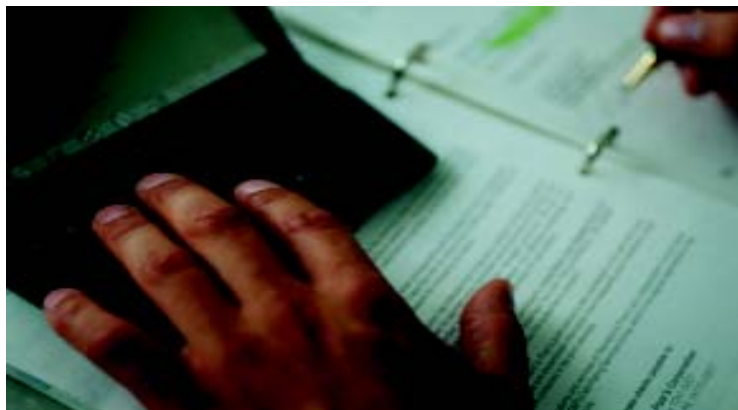
Staff Development for Workplace Education

Your workplace education program must be able to offer businesses instructors who will be successful functioning in a workplace environment. There are many differences in teaching in a learning center, or a vocational classroom, or an evening class at the local high school and a work place.

In addition to being good teachers who understand the adult learner, workplace instructors will need to become knowledgeable and skilled in the following:

· Linking individual organization's established work plans, shifts, policies, etc. to the course curriculum
· Understanding the key elements of effective learning program design methodologies and learner involvement
· Assessing the impact of learning on all stakeholders in the workplace context; e.g., learners, employers, unions, etc
· Establishing priorities with managers/supervisors prior to the course, in relation to staff changing departments, shifts etc
· Flexibility and willingness to work a variety of

shifts
· Demonstrating good work ethic and strong soft
  skills to learners

While instructors should have an awareness of the
following, it will be essential for workplace education
administrators to have knowledge of:

· Organizational culture and the distinct features of
  the workplace
· Marketing and promotion strategies to increase
  access to and involvement in learning
  opportunities
· Communication techniques for negotiating,
  contracting and connecting with stakeholders
  including employers, employees, and unions
· Strategies to overcome resistance from
  employers, managers and supervisors in relation
  to potential barriers; e.g., shifts systems,
  staff shortages, time out from paid work, return
  on investment, workload, lack of facilities/
  resources
· Methods to provide tangible evidence of the
  benefits to employers; the return on investment
  (ROI) factor

"Be aware that assessing company dollars (setting fees) is the challenge; ask for the sale to start classes; it's key! Recognize that income is generated from the private contracts of workplace education; this makes it more intriguing and enticing."
Anita Findlen, Biddeford Adult Education

A critical need is flexibility. Teachers should be expected
to change quickly as they may have to sometimes address
immediate issues at the workplace, even if it isn't in the
planned curriculum.

They need to be able to help learners make concrete
connections so that learners know how to immediately
apply what they are learning in the workplace context and
understand how that new learning can be applied in other
areas of their lives.

Teachers need to know how to be contextual – especially
if they are using a workbook or text that is broad in
nature.
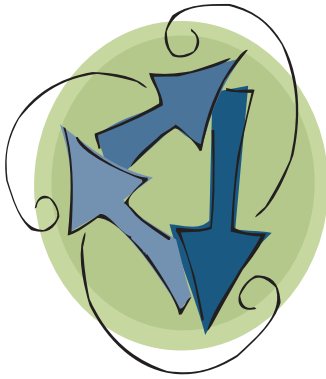
Teachers need to understand that learners, especially those in the workplace, come to class with many skills. Teachers need to figure out how to build on learners' knowledge and skills – this sometimes requires that the teachers become learners themselves as they learn from their own students – this is often disconcerting for teachers.

Currently there is no formal staff development for workplace instructors in Maine, however, here are some suggestions as you develop your own plan for your staff:

- Contact other adult education programs to share ideas and knowledge
- Contact the Center for Adult Learning & Literacy (CALL)
- Make use of the vast reference library at CALL
- Visit the New England Literacy Resource Center's web site (http://www.nelrc.org)
- Review the resources in the final section of this guide

"Look at opportunities to provide staff development within your own school district."
Bette Thibeault, River Valley Adult & Community Education

Creating a Marketing/Sales Plan

Here's a situation familiar to many of you. The training director of Photonics, Inc. has contracted with a Boston-based training firm to spend two days training six of his people on Microsoft Excel. When he speaks to the director of the local adult education program at the monthly Chamber of Commerce meeting, he complains about having to spend over $1500, the cost of two six-hour training sessions plus travel costs, while taking six employees and six computer terminals "offline" for two days. When the adult education director tells the training director that her program has provided the same kind of training to local companies for far less cost, he replies "Who knew?"

How do we communicate our ability to deliver workforce training to our local businesses? The answer is to develop a marketing strategy, a plan that will emphasize training opportunities for businesses through the local adult education program. The plan will be developed utilizing steps that businesses follow to sell services or products.

Questions to Guide Plan Development

As you begin your planning here are some questions to be considered:

- Who are my customers?
- Where are my customers?
- Do I understand their business?
- What is the culture of the business?
- What are the advantages of contracting with adult education?
- What are the credentials of the instructors you might be employing?
- What special skills do your instructors need?
- Who else is providing these services now, and in the future?
- What is the competition offering that we cannot offer?
- How are the services being provided (on-site versus off-site, equipment provided or using client's equipment, customized learning aids or client provided materials?)
- What is the return on investment? How can you convey that message best?
- What are the larger employment trends in the area?
- What is the real training need and is it the same as what you are being told?

The Adult Education Alliance of Androscoggin County (including Auburn, Lewiston, Lisbon, Turner, Oak Hill and Mechanic Falls/Poland Adult Education) pooled their resources and efforts to create a marketing tool entitled **"Adult education in the workplace is a smart idea."**

In the above scenario the adult education director learned of a professional, for-profit training company located in a city almost one hundred miles away. In your area, there may be a community college offering computer training at least, and possibly other workforce training programs, that may compare favorably with those of your program. Many professional associations offer training programs specifically tailored to the needs of their members. And, many larger companies staff their own in-house training departments, who may (or may not!) offer advanced levels of workforce training to their employees as part of their overall mission.

Positioning Your Program to Compete With the Competition

So, how do your program's workforce training offerings measure up? Will the companies in your area rate you better than, equal to, or worse than the competition? As you put together your sales/marketing plan, position your program by emphasizing:

"Sell slots in programs such as Certified Nursing Assistant to local health care facilities (hospitals, nursing & rehabilitation centers) to fill shortages and classes"
Tim Dresser

- Quality of services
- Selection/Options – your offerings are fully customizable (refer to section on Customized Workplace Education)
- Flexibility of services
- Locations – how far will your instructors travel?
- Committment to customer
- Reliability
- Expertise
- Projected outcomes
- Cost effective pricing
- Past success stories complete with numbers
- Compatability of your instructor's teaching strengths and students learning needs.

Some self-reflection will be critical here. What are your strengths? That's what you should be selling. What can you do better than the competition? You can be more expensive than the competition if you consistently show learning results which exceed the competition. You are dealing with business so you need to develop a business mindset, a business vocabulary, a business focus on accountability and a business appreciation for the value of time.

Some suggestions for ways you can stress your program's <u>competitive advantages</u> to secure a niche in your market:

- Use the Adult Education logo and other marketing tools to create an image for your program
- Use the Media – newspaper, Public Service Announcements (PSA's) on radio, your brochure
- Use your personal power to sell
- Use your and your staff's personal contacts and networks
- Join local civic groups and make yourself known in your community
- Appear at events and network with other attendees.
- Write articles for the newspaper
- Create television bites with your local cable stations
- Create a Sales/Marketing Kit including:
    - Business Cards
    - Program Information Page
    - Services Offered
    - Staff Bios
    - Clients Served
    - Testimonials
    - Press articles on adult education providing workplace programs, either our program or any other in the state

Falcon Shoe and Lewiston Adult Education have collaborated in providing workplace learning since 1988. Fifty employees have earned GED's and many more improved their study skills, reading, writing, math skills and computer skills. Falcon also paid registration fees for their employees to attend vocational classes and complete certificate programs at Lewiston Adult Education.
Betty Gundersdorf, Lewiston Adult Education

How To Be Customer-Focused

To increase your opportunities and create employer partnerships you must be "customer-centric:"

- Get involved with area business organizations
- Anticipate your customer's needs - follow local business trends
- Use customer profile information to personalize your offerings
- Use every available contact to exchange information that will strengthen and expand the relationship
- Deliver a consistent and appealing message at every interaction
- Pay attention to what customers say they want; then deliver information and offers that cater to those needs and preferences
- Allocate up to 5% of your contract's budget for promotions
- Have a customer satisfaction policy
- Periodically conduct customer satisfaction surveys

Final Thoughts

Last, but definitely not least, develop a Business Advisory Committee. As with any committee, be sure you are clear about the "who, what, where and why" of this group. Who do you want on the committee? In considering this, remember that quality is more important than quantity. What is the purpose of this group? Where and how often will the group meet? Be able to answer potential members' inevitable question, "why me?" This committee can serve as a thinking partner for the development of your Sales and Marketing Plan, give you useful insights into the world of business, and provide contacts through their own networks. Engage this committee with your goal of creating partnerships with employers to meet their learning needs!

Collaboration, Partnerships and Workplace Learning Programs

Partnerships with employers for the provision of workplace learning programs

Whether your program is providing training in a specific computer application at a local business or involved in a grant-funded program involving multiple organizations, working with partners requires skill and planning. Successful partnerships collaborate to establish shared goals, outcomes, resources and responsibilities. We all have a tendency to use partnership and collaboration interchangeably so let's be clear on the difference.

"Collaboration is the creative outcome of a good partnership. Business knows the production enterprise. Education knows the business of learning. Bringing the strengths of both together to solve a specific workplace education dilemma and collaboration in program design can result in 'best practices,' producing the best possible outcomes both for learners and employers."[3]

A note of caution here. While your goal is to create partnerships with employers, some will need to be helped to see the connection between well-trained employees and the bottom line. Training is often considered to be an overhead expense. The problem is often that some of the benefits of training, which include things like improved morale, personal growth, loyalty, etc., are difficult to measure. What employers need, whether they realize it or not, is employees who are able and willing to learn. Learning is what guarantees, or at least, improves the chances of survival. To learn is to adapt. To adapt is to survive.

"Lewiston Adult Education worked with Falcon Shoe Manufacturing Company to create a workplace advisory committee at Falcon Shoe which guided its workplace learning programs. Supervisors who served on the committee were especially helpful in recruiting employees to participate in the program and in supporting their participation."
Betty Gundersdorf, Lewiston Adult Education

3 Ann Savino, *Workplace Literacy Training & Technical Assistance Project*, Texas Center for Adult Literacy and Learning, *Literacy Links* newsletter, Volume 4, No. 3, Spring, 2000. http://www-tcall.tamu.edu/newsletr/spr00/spr00b.htm

Characteristics of a Successful Partnership:

- Understanding each partner's mission and goals
- Purpose statement for the work to be done
- Formal agreement that includes program costs, information about curriculum and program outcomes, roles, responsibilities and resources of each partner, and timelines
- Frequent and clear communication
- Formal structure for problem-solving
- Recognition of what constitutes a win-win situation for each individual partner
- Willingness to adapt to the evolution of business needs (e.g.24/7 operations, multiple shift operations, rotating schedules, pre-start up training times, lunch-box type training opportunities, shop floor training, etc.)

Getting Started

Do your homework about the company before your initial contact. Getting background information will prepare you to ask good questions when you meet with the company contact. Ask for a tour of the company. Discuss training needs with both management and employees. Ask for samples of materials such as employee manuals and related materials that will help you better understand the environment. Performing a comprehensive needs assessment can lead to a lasting partnership that involves more than one-shot learning program at a work site.

Be careful not to overwhelm the prospective client with grandiose plans. Business people like quick fixes. That can be the foot in the door. Educators probably don't like to think of themselves as problem-solvers but that is exactly what most business people are looking for. We like to think of ourselves as foundation builders providing skills for the long haul. We need to find a place to meet in the middle and proceed.

An indicator of a partnership's success is an on-going relationship. A business-education partnership can often involve an on-going commitment to promote employee learning to meet the training needs of a business. It may evolve over many months, even years, and may be comprehensive in addressing employee and business needs. The partnership may change in response to changing needs and opportunities. It's important to recognize that businesses fall into a number of categories when it comes to training which will have an impact on your ability to create a successful partnership with them.

- Businesses who know their employees need training and are:
    - interested in providing training
    - interested in "assisting in the process"
    - not interested (for a variety of reasons)
    - too overwhelmed to consider it
            OR
·Businesses who don't recognize that their employees need training but:
    - would be interested in partnering to provide training with the right encouragement and incentives
    - would be interested in "assisting in the process" if they understood what their role would be
    - have no interest in providing training
    - are too overwhelmed to consider it

Partnerships to Promote Workforce Development

Business Advisory Committee

There are two types of advisory committees to consider in working with businesses in your community. Introduced in the previous section, a Business Advisory Committee includes representatives of the local business community who help you and your adult education program make decisions about how you can best meet the workforce development needs of your community. They can help you make decisions about curriculum, certificate programs, etc.

When creating your Business Advisory Committee do not forget the agencies or organizations which provide candidates to the employers: temporary agencies, federally funded or state funded employment or reemployment programs, employment services, and career organizations (e.g. Central Maine Human Resources Association), development agencies which are trying to attract new businesses and local and state chambers of commerce which have a finger on the pulse of what employers need in good employees.

Workplace Advisory Committee

A Workplace Advisory Committee is an example of collaboration with both internal and external partners. The workplace advisory committee brings together the key stakeholders: employees, managers, union representatives (where applicable), human resource professionals and education providers to engage in program planning and building support for workplace learning at a specific site.

A workplace advisory committee that collaborates successfully will:
- Have a clear purpose
- Have defined roles, responsibilities and procedures
- Keep written records of its work together

- Serve as a bridge between management, employees, unions (as appropriate) and the adult education instructor
- Keep the organization informed about the program
- Assist the adult education instructor to overcome roadblocks
- Create marketing and recruiting strategies to generate program participation[4]
- See benefits for them or their business in the resources this program can provide

The workplace advisory committee may make recommendations regarding:

- Identifying common ground
- Identifying program goals
- Formulating policies around work release time
- Reporting employee/class progress while maintaining confidentiality
- Reporting attendance
- Developing curriculum
- Providing feedback from trainees related to additional training needs, suggestions about content, etc.[5]
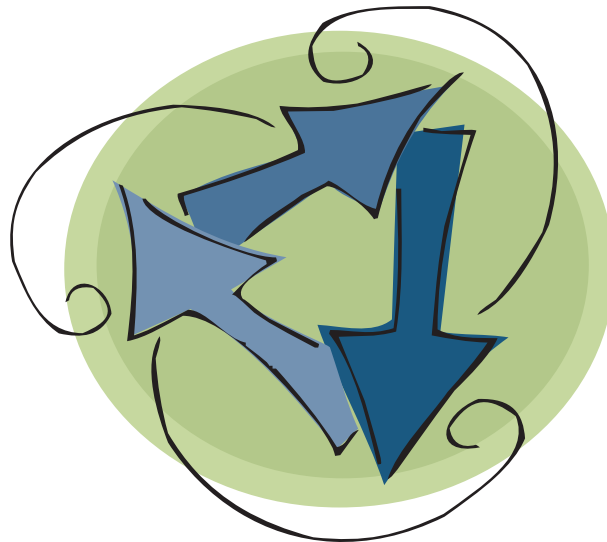
4 Dent C. Davis. *Adult Education At Work. A Collaborative Resource Addressing the Changing World of Work and Learning.* Division of Adult and Community Education, Department of Education, State of Tennessee, 1997. http://aeonline.coe.utk.edu/workforce_development.htm

5Massachusetts Workplace Literacy Consortium. *1999 Workplace Education Guide.* Massachusetts Department of Education, 1999. http://www.doe.mass.edu/acls/otherrl.htm

<u>Regional Partnerships</u>

Combining the resources of the members of regional alliances may maximize your chances for success engaging with businesses in your region. Working with businesses takes time, and by combining forces, the work can be shared. Taking a regional approach also maximizes resources available to meet the varied training and scheduling needs from business to business.

<u>Potential Regional Partners:</u>

- Adult education alliances
- Department of Labor
- DOL Career Centers
- University of Maine Centers
- Local school systems
- Maine Centers for Women, Work and Community
- Department of Human Services
- Labor unions
- Community Colleges
- Women Unlimited
- Coastal Enterprises, Inc.
- Business associations
- Local chambers of commerce

Sealing the Deal – Creating Proposals, Budgets and Contracts

Writing a Strong Proposal

You have successfully engaged with an employer who would like a proposal for training services from you. Do bear in mind that many employers may be soliciting proposals from more than one provider. This is all the more reason for you to gather as much information as possible from the employer regarding their expectations of the training. It is the proposal that the business accepts, the contract is simply the formalization of all the points covered in the proposal.

The list below gives you an idea of what to include in your proposal:

- A statement articulating your understanding of the business' training needs based on your discussions
- Secondary to that statement, identify the goals and outcomes that will result from the training program
- Your plan for accomplishing those goals and outcomes which encompasses
    - Initial assessment
    - Design of customized curriculum
    - Delivery of the training
    - Evaluation
    - Reporting
    - Time line for all of the above

- Resources you will be using; it's very important to spell out resources you are providing (i.e. staff, materials, etc.) and resources provided by the business (i.e. training room, access to company-based materials to be used in instruction, and anything else you and the business have agreed upon)
- Budget that covers all that you have outlined in your plan including resources; within this section consider a short sentence reiterating the fact that the training cost cited is based on the details listed above and any variation in the training plan will necessitate a re-visiting of the costs.
- Contact information for your program

There are many types of proposal formats which can be used. You might want to conduct an internet search to see what other organizations have used. The Tennessee Department of Education, Division of Adult Education has created a very comprehensive workplace education guide for adult education programs. It includes detailed descriptions and sample forms for creating proposals.

(http://slinks.coe.utk.edu/pdf/adulted.pdf)

Other sources for proposals samples and/or templates include:

- Maine's Adult Education Department
- Adult Education programs within your Alliance
- Adult Education programs outside of your Alliance
- Your local school district
- Review your files to locate proposals you have received
- Business members of your program advisory board
- Proposals in which your program has been a named partner

Creating a budget

Getting the budget right takes time and a detailed analysis of what your training plan encompasses. You will have two documents; one is your complete cost breakdown (sample A), and the second (sample B) is the budget you include in the proposal. Any time you break a budget down to too much detail within a proposal, it gives more opportunity for it to be

whittled down.

Sample A: This is the detailed budget you prepare for your purposes.

A Maine company identified employees who need help using technical manuals. The Director of Human Resources contacted the Maine Department of Labor for assistance. He was advised to submit a Governors Training Initiative (GTI) proposal and was assisted with the application by Department of Labor personnel. The local adult education program was contacted to prepare a fee for service agreement to co-submit with the GTI proposal.

Number of students: 8 employees

Length of time: Class will meet for 2 hours twice a week for 10 weeks for a total of 40 hours.

Instructional Time: A detailed breakdown follows:
        Instruction $800.00
        (40 hours x $20/hour)
        Curriculum Development $200.00
        (10 hours x $20/hour)
        Program Planning $100.00
        (5 hours x $20/hour)
        Preparation Time $400.00
        (2 hours per week x 10 weeks or 20 hours x $20/
hour)
        Pre-assessment $240.00
        (1.5 hours x 8 employees or 12 hours x $20/hour)
        Post-assessment $240.00
        (1.5 hours x 8 employees or 12 hours x $20/hour)
        Evaluation $80.00
        (4 hours x $20/hour)

        Subtotal $2,060.00

Benefits
21% x $2,060 $433.00

Pre-assessment
Time plus cost of instrument
Time listed above
Cost of instrument @ $10 each x 8 employees $80.00
(may be higher if developing your own assessment)

Materials/Consumables
Books, supplies, copying $40.00

Textbooks
Price rounded up x number of participants
Manuals used in workplace were textbooks. $0.00

Mileage
If deemed appropriate $0.00

Subtotal $553.00

Administrative Fee
15% of total cost
15% x $2,613.00 $ 392.00

Total Cost $3,005.00

Sample B: The same information and numbers as above, however, prepared for inclusion in your proposal to the business.

Effective Use of Technical Manuals - Training Course Budget

Staffing Costs $2,875.00
includes pre/post assessment,
course design, delivery, evaluation
and reporting

Resources $140.00
includes assessment and
instructional materials

Expenses $100.00
        includes mileage

TOTAL $3,115.00

Cost Per Participant $390.00
(Employers will almost always want to have this cost per
participant figure.)

A few notes on the sample B budget. Build any
administrative fees into the existing expense categories, do
not show as a separate line item. Rather than have odd
numbers, round each expense category up to whatever is
closest, 25, 50, 75 or 100.

Writing the Contract

Once your proposal and budget have been accepted you
are on the home stretch. You have done all the hard work
with those two documents; writing the contract will be
quite straightforward. If your program is part of a school
district there may be very specific contracts you are
required to use. So, your first step is to talk with the
business manager to clarify this issue.

If indeed there is a specific district contract, you will be
inserting the particulars of your proposal and budget
information into a pre-existing template. It would be

valuable to read the contract over very carefully to make sure everything in it makes sense to you. If you have questions it's important to raise them. Remember, once you and the business have signed, it becomes a binding document.

If your program is not required to use a specific template, seek out samples from the resources listed in the proposal section. Some important points to bear in mind: include terms of payment, expected deposit prior to commencement of any activity, cancellation and payment/refund policy. Include the business manager of the school system at this point in the process, especially reading and reacting to the draft proposal.

Assessment – The Next Step

Why Conduct a Skills Assessment?

Before starting a workplace training program, it is important to know the starting skills levels of the trainees. With this knowledge, curriculum can be developed that will be appropriate to those levels – not too easy (and thus boring) or too difficult (leading to failure to learn). The type of assessment to use depends on the goals of the training program. It is also important to understand what issues may affect the outcomes of the assessments. An important reminder, assessment is not the same thing as evaluation. Evaluation will be covered in the following section.

What Is a Skills Assessment?

- Definition of assessment for workplace applications:
  - A process to identify training needs and non-training needs
  - A process to identify the gap between the ideal skills and knowledge and the current skill levels
  - A means to assess current skill levels of employees
  - A tool to guide development of curriculum for training

What To Consider When Carrying Out a Skills Assessment

Conducting an assessment provides a variety of information to the workplace instructor. Assessment results can identify training needs, skills gaps, pinpoint performance problems for remediation, as well as guide curriculum development. Assessing skill levels pre and post training can be done by using the same assessment instrument at both times. Being able to report back skills gains to the employer, the adult education program as well as funding agencies is extremely important.

Issues in Assessment

There are issues around assessment that are important to consider when you are choosing the method of assessment, determining who is given what assessment information and the impact of assessment on the learners. These issues include:

- Confidentiality
    - Employees being assessed need to know the purpose of the assessment, how the assessment results will be used, who will see the information, and if names are attached to results. It is important to get a signed release before sharing this information.

- Limited English proficiency; not all tests are appropriate for limited English proficiency

- Cultural differences
    - "…we need to understand how cultural background influences LEP students' approaches to test taking…. We may need to consider the student's individual level of acculturation"[6]

- Test anxiety that might produce an inaccurate assessment result

A trainer developed a quick, self-assessment that was administered before a multi-session computer skills training course. The questions were phrased as "I can …. [for example, '…format documents in MS Word']." This allowed the trainer to develop the curriculum to start with what the learners knew and to focus on the skills they needed to learn.

6 Geisinger, Kurt F., & Carlson, Janet F. (1992). "Assessing language-minority students." Practical Assessment,

Research & Evaluation, 3(2). Edresearch.org/pare/getvn.asp?v=3&n=2

- Validity and reliability
  - If you are not using a standardized assessment, then it is difficult to deal with validity and reliability – especially if the assessment is created for a specific purpose – for example, to determine whether employees can read the new manuals
  - "The validity of an assessment depends on the degree to which the interpretations and uses of assessment results are supported by empirical evidence and logical analysis."[7]

Types of Assessment

- Standardized
- Norm-referenced tests such as TABE or CASAS
- Customized
- Can be contextualized using materials that are familiar to employees, such as the employee manual, safety signs, etc. to assess skills.
- Can be job-specific
- Can allow for variations in language proficiency
- Performance assessment
- Trainees are assessed on their ability to perform a skill or apply knowledge
- Organizational performance assessment
- Examines a company's work processes, organizational environment, customer service, and human resources
- Portfolios
- Inventories
- Surveys
- Direct observation
- Questionnaires
- Interviews
- Focus groups
- Self-assessment
- Work samples

7 Elliott, Stephen N. (1995). "Creating Meaningful Performance Assessments." ERIC Digest E531.

www.ericfacility.net/ericdigests/ed381985.html

How to Carry Out a Skills Assessment

Broadly speaking carrying out a skills assessment in the workplace will not be very different from carrying one out in a classroom environment. The biggest difference comes from how it begins and ends. Prior to choosing an appropriate assessment instrument to use, it will be important to have a discussion with the employer. You want to be sure both of you are clear on the goals and outcomes for the workplace program and course. At the end of the course it will be important to report the results of the course to the various stakeholders: learners, employer, your adult education program and any funders as appropriate. Each stakeholder may require different pieces of information.

Once you have clear goals and outcomes you will know what it is you are assessing. For example, workers in a manufacturing plant have new equipment which requires mathematical calculations previously not necessary. You need to know their current skill level in these new mathematical calculations. You will then:

- Select an instrument to use for assessment
- Administer the assessment
- Use the results to develop a training plan or customize curriculum
- Connect with resources in the workplace who can provide subject matter expertise to your curriculum
- Deliver your course or program
- Conduct a post assessment, if that is part of the agreed plan with the employer; or
- Provide opportunity for learners to demonstrate their skills gains via the agreed upon assessment method i.e. portfolio documentation, presentations, or written report, etc.

Customized Workplace Education

If training is the answer to a workplace need or problem, it will have an appeal. When training can be customized, it will become a reality. Consider the four company examples below.

- Company A needs to help employees compute the amount of yarn that will result from spinning a certain quantity of fiber
- Company B needs employees to be able to figure the amount of steel needed to produce a certain volume of cabinets
- Company C needs its employees to know how much dye should be added to a vat of hides as they are processed
- Company D needs employees to know the quantity of ink needed to produce a series of greeting cards.

Though each company's request involves math calculation the training you provide will need to target the specific context of the four companies. The math is *customized* to the particular need of each company. That is *Customized Workplace Training*.

Why Should Workplace Training Be Customized?

Establishing a workplace relationship is far more likely to happen when training can be offered that is useful and meaningful to the business or industry just as learners are more likely to learn if it is useful and meaningful to them. Your approach must, therefore, include some obvious initial knowledge of the company's product or service, and it must project your willingness and ability to customize.

How Can Workplace Training Be Customized?

Based on the assessment you performed with the business and its employees you will have a general idea of the knowledge and skills needed to meet the training goals. They could include some or all from the following list:

- technical skills
- math to solve problems
- reading skills
- memo or report writing skills
- problem-solving skills
- critical thinking skills
- communication skills
- soft skills such as team building, conflict management

Once you know what skills and knowledge are needed, the next step is to create an overall outcome statement for the training program or course. The outcome statement should include: generalized results from the assessment, training goals and objectives, measurable goals which you expect to achieve through the training (i.e. 30% fewer errors, 10 % improvement in individual productivity, etc.) and the process being used to evaluate the training.

You will need to reach an agreement with the employer on instructional methods and strategies, availability of a subject matter expert (possibly a supervisor or training staff), instructional schedule and timeline for the program or course.

With the assistance of the employer and their subject matter expert identify the appropriate workplace resources to inform or be included in the program or course. Examples could include:

- employee manuals
- equipment operational manuals
- job descriptions/requirements
- employee advisory groups
- company documents
- reporting procedures

Tips and Advice

- Practice patience: organizing and scheduling courses can take several months
- Customize by tweaking, not always by creating from scratch
- Have diverse offerings available, i.e. computer applications, specific math and communications skills which can be customized
- Realize that sometimes an employee takes an enrichment course and speaks favorably to her/his employer and wants more…
- Be realistic about what your program can offer to workplace education
- Be aware that setting fees is the challenge
- Offer skill upgrading to groups/employees by skill level at businesses
- Offer courses specific to business/industry, i.e. GED-Preparation or customer service with funds such as Carl Perkins, if applicable
- Gather success stories of participants of workplace education programs, i.e. first graduate is now plant manager
- Determine the needs of the business and the employees they are trying to hire
- Listen and gather information about companies.
- Maintain a relationship with businesses so they know where to call for specific skill training

- Showcase customized training in your program brochure
- Seek out instructors from within the business community
- Sell slots in programs such as Certified Nursing Assistant to local health care facilities

Program Evaluation

Evaluation is a vital part of every training program. Besides telling you if the training was successful, it can help improve future training efforts through what you learn. Although evaluation is usually done at the end of training, it must be planned for at the very beginning of program development. Evaluation is a way to ensure continuous quality improvement.
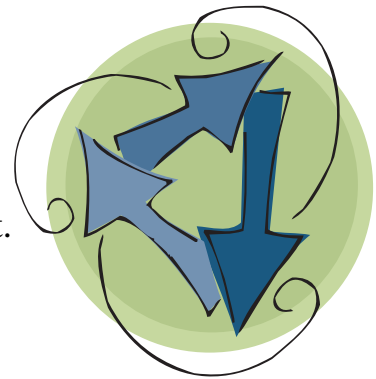
There are two forms of evaluation. One is on-going throughout the training and is used to determine if the training is going the way it was intended. If changes need to be made, they can be implemented as you go. The second evaluation occurs at the completion of training and is used to determine the overall success of the training and what changes could be made in the future.

It is recommended that adult education program administrators consider hiring an evaluator to assist with designing the evaluation. One option would be to hire an evaluator to create a template which can be adapted to the needs of each workplace program. Another option is to build the cost of the evaluator into the budget for every workplace program you deliver. Either way, being able to provide the employer with concrete, measurable outcome data is crucial to the ongoing success of your workplace education program.

Purpose For Conducting a Program Evaluation

An evaluation will meet the needs of a variety of stakeholders. For the learners it will ensure that their needs are being met. For the employer it will determine if the program met the needs it was designed for and therefore justify the cost of training. For the instructor it allows for self-reflection about the process and its success/failure; what worked well and what changes are needed to the curriculum design. For the adult education administrator it will help them develop recommendations for offering the program another time. Overall, an evaluation will determine the value of the training program or course to all involved.

General Questions to Be Addressed By the Evaluation

- What needs must the program meet?
- What will be the value of the program if it's successful?
- How can we tell if it's working well?
- What determines success?
- How will we make changes if things need changing?
- What value did participants see in the program?
- How will we know whether participants learned the content and can apply it?
- How will we know that participants can transfer the learning to their jobs?
- What is the organizational impact from the training?
- What was the return on investment for the cost of the training?

Collecting the Evaluation Information

Some of the evidence a good evaluator collects will include:

- Questionnaires to be filled out by participants.
- Attendance records.
- Discussions with training facilitators.
- Input of supervisors of participants.
- Results of pre- and post-tests.
- Recommendations of participants.
- Anecdotal information.
- Participant portfolios.
- Learner contracts

Resources, Contacts and Glossary
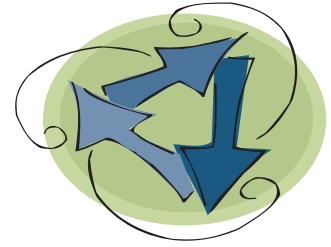
General Information for Workplace Education

The Massachusetts Workplace Education Guide (1999), available from SABES/World Education
http://www.doe.mass.edu/acls/otherrl.htm

SABES book collection and file cabinet resources
www.sabes.org/resources/bibwork.htm

Worker-Centered Learning: A Union Guide to Workplace Learning (1990), available from AFL-CIO:
http://www.workingforamerica.org/documents/handbook.htm

The Workforce Education Special Collection demonstrates the value of workforce learning, fosters and promotes the development of high-quality workforce education programs, provides guidelines for planning and supporting these programs, and supports ongoing communication and collaboration among stakeholders.
http://worklink.coe.utk.edu

Workplace learning, policy implications from Brown University
http://www.brown.edu/Departments/Swearer_Center/
Literacy_Resources/work.html

A free site containing workplace basic skills information, tools and advice for employers who want to raise their employees' skill levels.
http://www.workplacebasicskills.com/

Office of Vocational and Adult Education, Division of Adult Education and Literacy US Dept. of Education, Workforce education web sources list
www.ed.gov

Adult Education At Work: A Collaborative Resource Addressing The Changing World of Work and Learning
http://slinks.coe.utk/edu/pdf/adulted.pdf

The U. S. Department of Labor established the National Workforce Assistance Collaborative (NWAC) in 1993 through a cooperative agreement with the National Alliance of Business (NAB) and its partners. NWAC's mission is to help small and mid-sized businesses adopt high performance work practices, become more competitive, and ultimately, to create and retain high-skill, high-wage jobs for American workers. In addition, NWAC was set up to strengthen service and information providers so they can better meet the needs of these businesses in four key areas: workplace literacy, employee training, work restructuring, and labor-management relations.
http://www.ed.psu.edu/nwac/
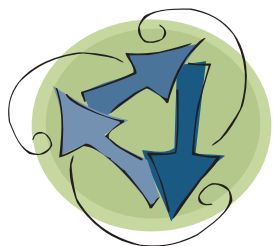
Workplace Literacy Central is a free resource with information, tools and advice for Canadian organizations and employers who want to raise literacy and basic skill levels in the workplace.
http://www.conferenceboard.ca/workplaceliteracy/

Developing and maintaining a well-trained workforce is a high priority in Washington State. On-the-job training programs that integrate literacy skills and work-based knowledge can keep high-performance workplaces competitive. This site offers information, resources and technical assistance to help employers successfully create and support workplace basic skills programs http://literacynet.org/workbasics/home.htm

Workplace Literacy: Employment Issues for the Adult Learner with Learning Disabilities
 http://www.nifl.gov/nifl/ld/archive/workplac.htm

Workplace Basic Skills Network, Lancaster University, Lancaster, UK
www.lancs.ac.uk/wbsnet

workforceUSA.net is a collaboration among workforce development organizations and professionals. The site was initially developed in response to our collective frustration with trying to find useful tools and materials for a wide variety of workforce development projects.
http://www.workforceusa.net/home

This site showcases the stories and keys to success of companies that effectively utilize training programs**.**
http://www.workforceadvantage.org/
Practice.asp?Category=2&PracticeID=3&SP=1

ABC CANADA Literacy Foundation is a national charity committed to promoting literacy to the general public and to the private sector.
http://www.abc-canada.org

The Work-Based Learning Project is designed to provide the research, best practices, tools, tips, and learning communities to help you design and implement effective based learning programs. It is designed to meet the needs of employers, unions, workplace educators and trainers, and officials at the state and local levels responsible for workforce development.
http://www.work-basedlearning.org/

Information for Funding

Called the newspaper of the nonprofit world, this publication lists grant resources   http://www.philanthropy.com

This USDOE website for educational grants and funding opportunities for teaching and learning also provides access to the federal register listings.
http://www.ed.gov/funding.html

New funding opportunities in science can be found here.
http://www.nsf.gov/start.htm

This website for Florida Community College and Workforce Development lists funding and grants for technical and workforce skills.
http://fldoe.org/cc/

The Maine Department of Labor website for The Governor's Training Initiative, a program that reimburses private-sector employers for training services costs associated with expansion, retention and upgrading issues.
http://www.mainecareercenter.com/business/GTIlink.htm

Lists several grant programs for students and institutions.
http://www.pawin.org

As the official daily government publication, the federal register lists rules, notices of federal agencies and federal grant requests for proposals.
http://www.gpoaccess.gov/fr/index.html

Workforce Management: News in Brief E-Newsletters: *Workforce Week*, *Dear Workforce*, and *Workforce Recruiting*
http://www.workforce.com

Information for Staff Development

"Reflections on Workplace Education: Teachers Talking to Teachers"
by Better Education Skills Training Program, Vermont Institute for Self-Reliance, Rutland, VT
www.hub1.worlded.org/docs/reflects.htm

Workforce Education Special Collection
Includes links and directories, workforce instructors' resources, workers/learners, program administrator/human resources, facts and statistics, and policy and legislation.   worklink.coe.utk.edu

James Madison University, Workforce Development Campus, Harrisonburg, VA An on-line certificate-granting program for workforce educators. www.jmu.edu

Information for Marketing and Sales Planning

American Society for Training and Development. A membership Association for trainers in business and education. A plus for a group to join. Offers a national conference, on-line information, newsletter and magazine.

The Hibernia Group. A group that offers information on Sales and Marketing www.thehiberniagroup.com

Chamber of Commerce in your community

Market Development Center. Assists small business to access federal contracts, through e-mail notices of business opportunities taken from the Federal Register and the Commerce Business Daily. Contact: 207-946-6389

Coastal Enterprises, Inc. Regional Economic Development Agency based in Wiscasset, Me. Socially related lending programs for business.
www.ceimaine.org

Maine Biz newspaper. Outstanding publication on what is happening in the business marketplace in Maine
www.mainebiz.biz

Dale Carnegie Training of Maine. Sales, Leadership, and Personal Development training
www.maine.dalecarnegie.com

New Entrepreneurs (young business)
rmorling@mainebiz.biz

Small Business Development Center, University of Southern Maine 207-780-4804. There are local offices throughout Maine and the organization supports development of business and industry. Some of the offices are located in Androscoggin County (AVCOG), U.S.M., Eastern Maine Development Commission. Contact U.S.M. for more information

Maine Association of Nonprofits, 207-871-1885; manp@nonprofitmaine.org Grow, Perform, Achieve, Succeed can be your business mantra.

Information for Partnerships and Collaboration

Pruitt, Jeanni. Collaboration…a Paradigm Shift in Adult Education. Literacy Links newsletter. Spring 2000. Texas Center for Adult Literacy and Learning. www.tcall.tamu.edu/newsletr/spr00/spr00a.htm

Kerka, Sandra. Developing Collaborative Partnerships www.cete.org/acve/docgen.asp?tbl=pab&ID=71

Resources for Assessment

Assessment Tools: literacy.kent.edu/Midwest/assessment/tools.html

Basic Guidelines for Training Needs Assessment: www3.hr.com/hrcom/index.cfm/169/D7496C65-A080-11D5-9ACA009027E0248F

Bond, Linda A. (1996). "Norm- and criterion-referenced testing." Practical Assessment, Research & Evaluation, 5(2).

"Identifying Needs Checklist" by Workplace Education – PEI (Prince Edward Island, Canada) www.nald.ca/PROVINCE/PEI/wepei/newslet/apr00/page4.htm

Lam, Tony C. M. (1995). "Fairness in Performance Assessment." ERIC Digest ED391982. www.ericfacility.net/ericdigests/ed391982.html

Maine Adult Education Assessment Framework. www.umaine.edu/CALL/assessment/assessment.htm

The Molson-Edmonton Learning Centre, (2003). "The Molson Workplace Needs Assessment." Edmonton, Alberta, Canada: The Molson-Edmonton Learning Center. www.nald.ca/molson/needs.html

Massachusetts Workplace Education Collaborative Policy Subcommittee (1999). "Best Practices Guidelines for Workplace Training Programs." Boston, MA: Corporation for Business, Work, and Learning.

National Workforce Assistance Collaborative (1997). "Looking at Training in a Business Context: The Role of Organizational Performance Assessments." National Workforce Business Assistance Note #5.

Roeber, Edward D. (1996). "Guidelines for the development and management of performance assessments." Practical Assessment, Research & Evaluation, 5(7).

"Sample Workplace Audit Interview Questions" by Capitol Region Education Council, CT www.crec.org
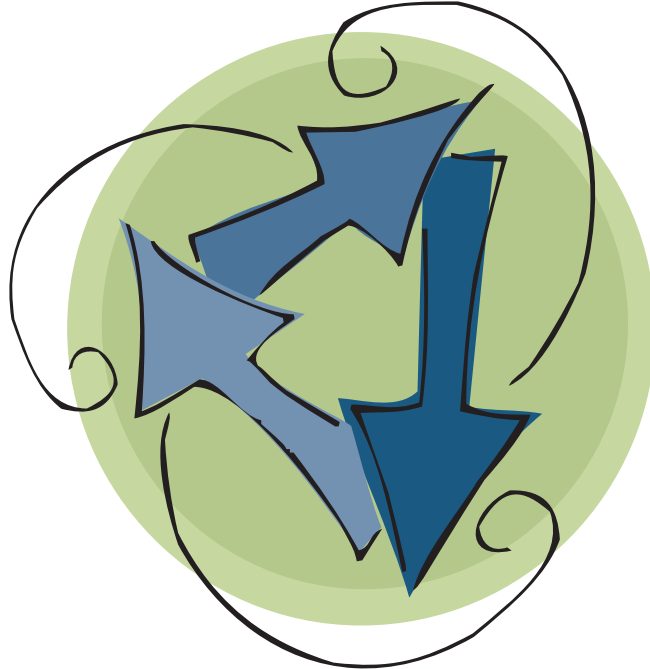
Contacts

Who is Involved with Customized Workplace Education?
Here are some examples compiled from the Workplace Education Survey – Fall 2002. Information about program directors can be found in the Maine Adult Education System Directory.

Technology

Auburn	Gray/N.Gloucester	Rockland
Biddeford	Kingfield	Turner
Bucksport	Lewiston	Waterboro
Caribou	Machias	Waterville
Ellsworth	Madison	Wells
Fort Kent	Milo	Windham
Freeport	Orono	

Basic Skills/ESOL/GED

Augusta	Mechanic Falls-Poland	Portland
Bangor	North Berwick	Sanford
Belfast	South Paris	Windham
Bethel	Turner	York
Houlton	Waterville	
Lewiston	Wells	

CNA/Health Occupations

Augusta	Madison
Damariscotta	Orono
Ellsworth	Waterboro

Customer Service/Clerical/Communication Skills

Auburn	Fort Kent	Madawaska
Biddeford	Freeport	Mechanic Falls-Poland
Caribou	Lewiston	
Farmington	Machias	

Specific Workshops/Other

Fairfield: Substitute Teacher Training
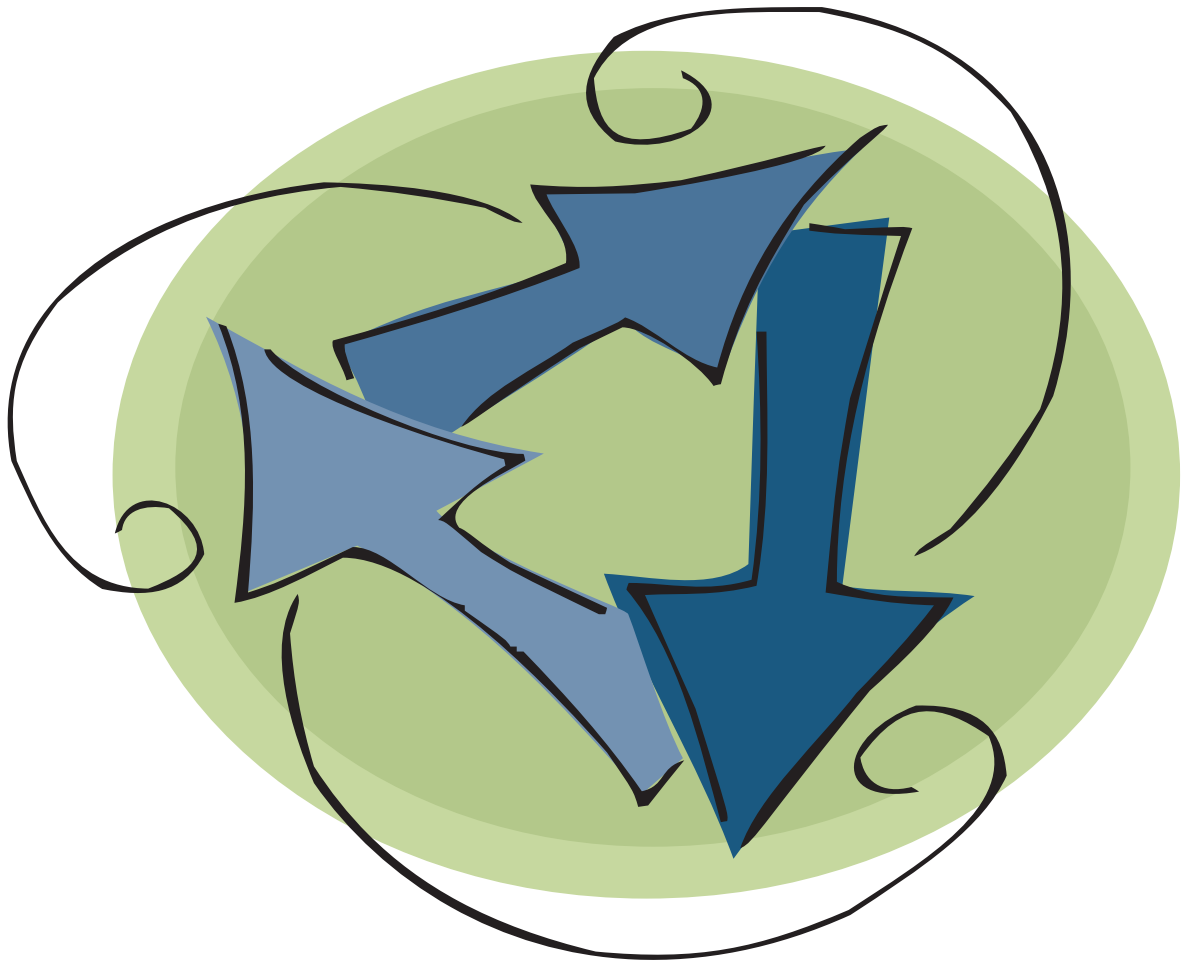Kingfield: Canadian French
Kittery: Business Writing
Mechanic Falls-Poland: Statistics, Physics
Skowhegan: Start/Grow Your Own Business
Turner: Brain Gym, Personality Development
Wells: Spanish for Floor Managers

Glossary

Benchmarks – articulated criteria to measure success and progress that is based on best practices, usually of outstanding companies or programs.

Carl D. Perkins Vocational Act - vocational-technical education offering sequences of courses directly related to preparing individuals for employment in current or emergent occupations requiring other than a baccalaureate or advanced degree. Programs include competency-based applied learning which contributes to an individual's academic knowledge, higher-order reasoning, problem solving skills, and the occupational-specific skills necessary for economic independence as a productive and contributing member of society.

Collaboration - Collaboration is a mutually beneficial and well-defined relationship entered into by two or more organizations to achieve results they are more likely to achieve together than alone.

Contextualized – material that is specific to a company or job that uses examples of documents or products found in the company and that workers are familiar with.   For example, productivity charts might be used to teach math skills.

Customized Curriculum - meaningful training activities using materials, resources and examples from the workplace in the classroom for instruction; teaching methods planned will incorporate adult learning theory and best practices and will transfer easily to the real world which is the workplace.

Customized Workplace Education - instruction that is customized to specific workplaces with subject matter that relates directly to what employees are doing in their work; employees will understand the relevance since not only will the subject matter be relevant but so will the materials used from their worksite in the classroom to teach specific foundation skills be meaningful.

External Customer - A member of the distribution channel who purchases the organization's products or services.

Fee-for-service - employer pays total cost of customized workplace education program; training is delivered with total financial support from employer/company.

Governors Training Initiative - a program of the Maine Department of Labor and the Department of Economic and Community Development, reimburses private-sector employers for training services costs associated with expansion, retention and upgrading issues. These can include recruitment, assessment, job task analysis, workplace literacy, high performance skills, technical training, higher education, on-the-job training, workplace safety and competitive retooling.

Internal Customer - Department or participant in the distribution channel who receives products or services from others in the organization

Likert scale – a ranking scale for answers to survey questions. For example, "on a scale of 1 to 5, where 1 indicates no interest and 5 indicates great interest, how interested are you in taking a class in writing business correspondence?"

Organizational Culture - refers to the values, beliefs and customs of an organization. Whereas organizational structure is relatively easy to draw and describe, organizational culture is less tangible.

Overhead costs - costs incurred for expenses not directly related to program delivery, i.e. space, telephone, equipment, internet access, accounting or data management services.

Return-on-investment – a process of determining the monetary benefit of training to the company.

Stakeholder - A party with an interest in an organization, e.g. employees, customers, suppliers or the local community. This is due to the effect that the organizations activities will have on them, although they are a "third party" in that they are outside of the organization. It can also be used to describe people who will be affected by a project, or who can influence it, but who are not directly involved in doing the work.

Workplace-specific assessments - instruments used to better understand the opinions, needs, desires and attitudes of workers; used to establish a baseline for future assessment and pinpoint organizational strengths and opportunities for growth; assessments can include questions from a variety of areas, i.e. teamwork, communications, training, environmental/ergonomic factors, workplace climate or other chosen areas.